

# STEP SEVEN

## WRITE THE “DIALOGUE”

What should our  
callers say?



### ACTIONS!

#### Write a “dialogue” rather than a “script”

A “script” is a one-sided speech that you memorize and repeat—not an effective phonathon technique. A “dialogue,” on the other hand, is the foundation of a conversation, a give-and-take between two people—a very effective phonathon technique.

Use the format below (and the “Sample Dialogue”) to create a winning dialogue for your callers.

#### Part One: The opening

After asking if the prospect is available, your caller should introduce himself or herself *right away* by first and last name and as a volunteer for your organization.

Next—and this is important—the caller should ask permission to continue. If it’s given...

...say thank you!

(Say thank you even if the prospect can’t talk right now—this person is a valued friend and should be thanked for past support.)

# What should our callers say?

## **Part Two: The reason for calling**

Your caller should briefly explain that a group of volunteers have gotten together for your urgent, compelling reason. This is where the caller makes your case for support, and where the passion comes through.

## **Part Three: The ask**

The caller makes a clear and direct ask for a specific amount of money. After asking, your caller needs to be quiet to give the prospect a few moments to consider the request. Then if your caller senses a “no” coming, he or she should find out if the donor has any questions, or reduce the amount of the gift request.

If the donor is still undecided (which can still mean “yes”), offer to send a blank pledge card that can be filled in later. Whatever the answer...

... say thank you!

## **Part Four: The confirmation**

Take a moment now to go over the calling card information—name, address, email—to make sure everything is correct. And most importantly...

... say thank you one last time!





## CONSIDER THIS...



### **SUCCESS STRATEGY:**

**Revise the dialogue for prospects  
nominated by volunteer callers**

Sometimes phonathon committees ask volunteer callers for the names and phone numbers of people they think might be interested in donating during the phonathon. Unless these people are already donors, you'll need to revise the dialogue somewhat to make these particular calls.



## Tools:

Use the following  
Tools to help you achieve your  
Successful Volunteer-led Phonathon:

.....  
▶ Sample Dialogue

***Tailor the following dialogue template to your own initiative.***

“Hello may I please speak with  
<First Name, Last Name>?”

*If the person is not available:*

“I am a volunteer calling on behalf of  
<Your Organization>.

When would be the best time to call back? Thank you.”

*If the person is available:*

“Good evening, <Last Name>,

My name is \_\_\_\_\_.

I am a volunteer calling on behalf of

<Your Organization>. May I ask for a few minutes?”

*If not able:*

“When would be a good time to call back and talk for  
a few minutes?”

*If not able to chat in near future:*

“May I send you some information?”

*If able to give some time:*

“About <x number of > volunteers are together tonight  
to raise money to help support vital services and  
programs for <Your Organization>. The most critical  
need right now is <brief statement of need to be met>.  
This program is responding by <brief statement  
of solution>.

Would you consider a gift of \$ <suggested ask> \_\_\_\_\_  
to help meet this need?”

*Pause and wait for answer.*

*If “yes” now or after initial hesitation:*

“Wonderful! May I confirm your address, and other  
contact information such as fax and email?”



I can complete your pledge of support tonight by putting your gift on <Visa, MasterCard or American Express> and I can send you confirmation of your pledge which you should receive in the next couple of days.”

*If prefer to pay by check:*

“Yes, I can send you a pledge card for you to return with your check right away.

Thank you very much for continuing your support.

Have a good night!”

*If hesitant and undecided:*

“Perhaps I can answer any questions you may have. or Can I put some information in the mail for you to focus on at a later date?”

*If “no” to the initial ASK:*

“The need is great, <Last Name>, and your participation is very important to <Your Organization>. Would you be interested in making a gift of \$ <last gift amount or next lower level>?”

*If “no” again:*

“Your support is very important to us. Is there any amount that you’re able to contribute?”

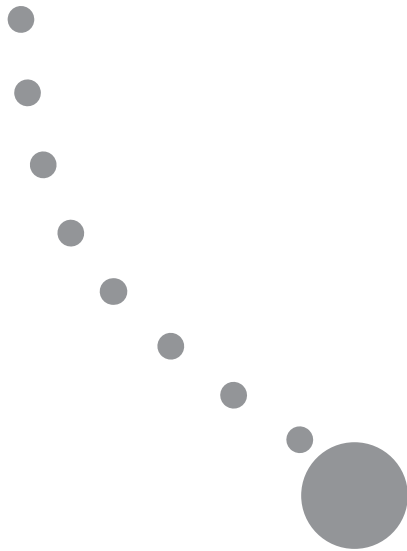
*If “no” to the final ASK:*

“Thank you for your past support, <Last Name>, May we keep you on our mailing list?  
Have a nice evening.”





## Review the Step



Ready for the  
Next Step?

## STEP SEVEN

### Overview:

#### ACTIONS!

- ✿ Write a “dialogue” rather than a “script”
- ✿ Part One: The opening
- ✿ Part Two: The reason for calling
- ✿ Part Three: The ask
- ✿ Part Four: The confirmation

#### CONSIDER THIS...

- ✿ **SUCCESS STRATEGY:**  
Revise the dialogue for prospects nominated by volunteer callers

#### TOOLS

- ▶ Sample Dialogue



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